

Frequently Asked Questions

RFP for AI

What type of data integration does MAS support (connectivity, document/data types, etc.)?

- None, our data reside in Microsoft SQL server.

Can MAS be configured to make API calls to external system?

- Yes, this integration can be configured as new functionality for MAS.

Can MAS import a JSON or XML file that would contain the documents, data and rules results?

- Yes, these import features can be configured as new functionality for MAS.

Does the upload of the 3.2 file complete data entry for file reservation and audit?

- Yes, the upload of the Fannie Mae 3.2 file completes a large portion of the data entry fields for loan reservation, MAS then runs validations based on system rules.

Will data captured from required documents be populated in fields within MAS overwriting original data imported through 3.2?

- CalHFA and our selected vendor will work through these requirements in the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work. CalHFA imagines that if there is a discrepancy between the data on the documents vs that input manually by the lender or via the 3.2 file an exception would present to a CalHFA auditor for review.

Are users manually indexing and entering data into MAS forms? Is the capability available to automate this process via an interface?

- When not using the Fannie Mae 3.2 upload feature our Lenders are required to manually enter data into the MAS Lender Portal, as well as upload the required loan documents into separate buckets. Please review the CalHFA MAS User Guides that were included in the

RFP.

Are the checklists in use part of MAS? Do the users reviewing the checklists print a copy of the checklist or work from the MAS interface?

- Both the Compliance review checklist and Purchase Review checklist are references for the CalHFA reviewers, they are not part of the MAS system.

Does CalHFA want a data reconciliation of documents provided and data imported into the MAS system upon reservation?

- CalHFA is looking for a solution to integrate with MAS, how that integration occurs will be discovered in the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work.

Is it the plan to have internal staff within CalHFA complete edit repair for document classification and data extraction?

- CalHFA plans to have internal staff review any exception.

CalHFA has stated that it is seeking an on-premises solution: is there any consideration for a SaaS based solution that can meet all the processing, checklist, and workflow requirements as a transactional hosted service?

- CalHFA prefers an on-Premise solution to ensure quicker turn times in data delivery and run times for predetermined business and system rules.

Does CalHFA prefer an on-premise or cloud solution?

- CalHFA is seeking an on-premise solution.

Are there estimates for the quantity of documents to be processed both on average and peak?

- Loan Review Volume
 - › Compliance Review average 1300 loans per month (22 potential documents)

- › Purchase Review average 2600 Loans per month (8 potential documents)

Across all CalHFA's loan programs, how many closed loans will be processed annually?

- Loan Review Volume
 - › Compliance Review average 1300 loans per month (22 potential documents)
 - › Purchase Review average 2600 Loans per month (8 potential documents)

Will CalHFA receive both 1st and subordinate lien document submissions via MAS?

- Yes, both the first and subordinate lien documents are submitted to CalHFA via MAS. CalHFA does also receive subordinate lien documents via US mail that is scanned into our image repository.

Where are the documents stored once they have completed the process?

- CalHFA stores documents submitted to MAS as blobs in SQL DB.

Is a document repository incorporated within the MAS system or is there another document repository used for storage purposes?

- Yes, CalHFA stores documents submitted to MAS as blobs in SQL DB.

Are all loans reviewed (1st and subordinate liens) uploaded to CalHFA site only then transferred to Lakeview for loan review on 1sts. Or, are the lenders having to upload to two locations?

- Currently, there is no document transfer between CalHFA and Lakeview, the lender is required to upload the loan documents to both CalHFA via MAS and Lakeview through their lender portal.

Are the audits completed using the PDF checklist provided, or are they implemented electronically within MAS for completion?

- The audits are completed referencing the checklist provided, they have not been implemented electronically within MAS for completion.

The questionnaire states 75 fields will need to be extracted for reservations. Will additional fields need to be extracted from documentation for purchase and compliance review?

- The 75 data fields are an estimate, that figured will be more clearly defined through the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work. Currently we do anticipate that additional fields will need to be extracted for purchase and compliance review.

Is a single sign-on solution a requirement for CalHFA users only?

- CalHFA is not looking to add any layer complexity to the reservation and review process of our loans, we believe that the addition of an additional system would increase the complexity for loan

What part of the Mortgage Loan Compliance and Purchase Review process currently requires the most time?

- Currently the Loan Compliance and Purchase Review process take approximately the same time. We are hoping to start with enhancing the Pre-Loan review process initially then moving on towards stream lining the Loan Compliance and Purchase Review process.

What would trigger certain loans to be prioritized above other loans?

- CalHFA does not prioritize loan reservations, they are processed on a first in first out basis. CalHFA and our selected vendor will work through these requirements in the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work.

Will the data-driven metrics and real-time reporting include just the imaging process or the activities that are part of other systems as well?

- CalHFA and our selected vendor will work through these requirements in the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work.

Will scanned documents include hand-written responses?

- It is possible that documents uploaded to MAS will contain hand written data that would need to be captured.

Will the data driven metrics and automated performance tracking and reporting be in the form of a vendor supplied portal or data feeds back to MAS?

- Ideally the reporting would be based upon the data that would reside in MAS. However, Per the RFP CalHFA is seeking a solution provider that can work with us through the Project planning, discovery, and requirement elicitation process.

Is all the data for the rules and guidelines provided?

- No, the data for the rules and validations will be more clearly identified during the Project planning, discovery, and requirement elicitation process once a solution provider has been selected.

Once the vendor is selected on 1/17/2020, what is the procurement process and next steps?

- CalHFA will begin working with the vendor toward a contract and set time line and deliverable.

When does CalHFA want to begin project kick off?

- CalHFA would like to begin project kick off once contract and time line for deliverable have been agreed upon by selected vendor and CalHFA

When does CalHFA want to be in production?

- CalHFA and our selected vendor will work through these requirements in the project planning, discovery, and requirement elicitation process requested in the RFP Description of Work.

Please provide the CalHFA evaluation criteria, as well as the weighting of technical vs. pricing in overall bidder scoring.

- CalHFA will be reviewing all submissions against the RFP for completeness and functionality to ensure the selected solution meets CalHFA's current needs as well as supports growth towards CalHFA's goals.